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## 2 PURCHASING

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### 2.1 DOCUMENTATION, AUTHORIZATION, AND PROCEDURES FOR PURCHASES

All purchases made on the District accounts and credit cards are to be strictly for District business, supplies, materials, and services.

#### 2.1.1 Purchase Requisitions

A purchase requisition will be required for all purchases for materials and services except for regularly scheduled (e.g. monthly or quarterly) utilities, payroll or insurance services. This document will be generated by the individual requesting the purchase or by the Facilities Manager. The purchase requisition shall be presented to the Director, or in their absence the Assistant Director, prior to making a purchase or giving authorization to a vendor. By default, purchases will be made by the Facilities Manager. Purchases may be made by Department managers for items that are related to their job responsibility, but coordination and communication with the Facilities Manager must be undertaken.

When making purchases locally for items totaling <\$100, prices may be unknown at the time the purchase requisition is filled out, but the prices should be filled in upon return from making the purchase.

#### 2.1.2 Purchase Requisition Amendments

Should revisions to the original purchase requisition be required or the items cost more than originally anticipated, a new purchase requisition should be generated, and the original requisition should be destroyed. Changes to the authorized purchase must be approved by the Director, or in their absence the Assistant Director, prior to making a purchase or giving authorization to a vendor.

#### 2.1.3 Purchasing Decision Structure

1) How many times per year is the item or service going to be purchased?

(Reminder: costs cannot exceed \$30,000/year unless publicly bid)

2) Is a substantial or predominant amount of the cost of the item to be purchased equipment, materials, or supplies, as opposed to professional services, labor or customizations of software, etc.?

YES (Go to 3)

NO (Professional services are not governed by the public bid law. Reminder: all contracts must be signed by the Director, and those >\$5,000 must be approved by the STPMAD Board of Commissioners.)

3) Is the item or service to be purchased considered software, computers, data processing, or telecommunication system?

YES (Go to 4)

(If costs are <\$30,000/year, obtain at least 3 quotes. Costs >\$30,000 requires public bid or RFP.)

NO (Go to 4)

4) Does the item or service require a contract or service agreement?

YES (Go to 5)

NO (Go to 8)

5) Is the contract or service agreement estimated to cost more than \$5,000 in a calendar year?

YES (Go to 6)

NO (Go to 8)

- 6) If yes to #5, has the St. Tammany Parish Mosquito Abatement Board of Commissioners formally approved the contract?
- 7) If yes to #5, has legal counsel reviewed the contract or service agreement terms?
- 8) Which category below does the total estimated cost for the item for the calendar year fit best?
  - a. <\$75 (requires purchase requisition)
  - b. \$75 -- \$499 (requires purchase requisition & purchase order)
  - c. \$500 -- \$29,999 (requires purchase requisition & purchase order; at least 3 written quotes and a statement of justification)
  - d. >\$30,000 (requires purchase requisition & purchase order; advertised public bid, RFP (software, data processing or telecommunications) or state contract and a statement of justification.

### 2.1.4 Purchase Orders

All purchases above \$75.00 require a purchase order. If the purchase is \$75.00 or more, regardless if individual items are less than \$75.00, a purchase order is required. The Facilities Manager shall generate the purchase order and present it to the Director for signature. In the absence of the Director, the Assistant Director shall authorize the purchase order. The signed original shall be sent to the Financial Administrator and the Facilities Manager shall retain a copy.

### 2.1.5 Delivery Ticket or Sales Receipt

A delivery ticket or sales receipt must accompany all purchases of materials and services. Individuals making such purchases shall indicate on the delivery ticket or sales receipt the purpose of each item and its application. For instance, if spark plugs are purchased from a local auto parts dealer, the individual making the purchase must write on the sales receipt where the spark plugs will be used and for what purpose. In this case, the purpose could be for a tune-up for a truck or to replenish stock. The individual making the purchase must also sign the sales receipt and turn it in immediately. This document is presented to the Facilities Manager, who will then cross check the sales receipt with the purchase requisition and/or purchase order for accountability.

### 2.1.6 Receiving Report

After the item has been purchased and the purchase requisition and delivery ticket/sales receipt are matched, the Facilities Manager will generate a receiving report to document the accountability of the purchase. The purchase requisition, delivery ticket/sales receipt, and receiving report are then sent to the Financial Administrator.

### 2.1.7 Lost Receipts

If a receipt is lost, the Facilities Manager or Financial Administrator will contact the vendor to request another copy of the lost receipt.

### 2.1.8 Invoices

The Financial Administrator shall attach the purchase requisition, purchase order, delivery ticket/sales receipt, and receiving report and then double check these documents with the invoice for accountability. If the purchase correctly matches the invoice with no discrepancies, the invoice is ready to be paid.

### 2.1.9 Transfer of Funds into Operating Account

To add another level of protection to the money market account the ad valorem tax funds received from the sheriff's office are deposited into the money market account and transferred through online banking approximately three times a year as funds are needed. The Accounting manager will present the operating bank balance to the Director indicating a low balance in the operating account to pay invoices.

The Director then okay's the online transfer of funds from the money market account to the operating account.

#### 2.1.10 Payment of Invoices

The Financial Administrator generates the checks to be paid from the operating account and then presents them to the Director for their signature.

#### 2.1.11 Reconciliation of Bank Statements & Management Review

For accountability, the Office Manager shall reconcile all bank statements. The Director, or in their absence the Assistant Director, shall review for approval of all reconciled bank statements.

#### 2.1.12 Credit Card Usage

The District has credit cards for Office Depot, Home Depot, Wal-Mart, Visa, and Fueltrac. (The District also maintains a Sam's Membership account, which is not a credit card.) The Office Depot, Home Depot, Fuelman and Wal-Mart credit cards are issued in the name of the District, with no individual's name. All purchases shall be made for District business only.

1. Visa cards are issued in the co-names of the District and the Director, Assistant Director, Facilities Manager, and Supervisor of Aerial Operations. The Director and Assistant Director shall use the Visa card for travel items, general purchase of materials and supplies. The Facilities Manager shall use the Visa card for travel and general purchase of materials and supplies for the District. The Supervisor of Aerial Operations shall use the Visa card for aircraft related materials and services and travel.
2. The Visa card may be used by a designated employee upon authorization of the Director, Assistant Director, or Facilities Manager. A purchase requisition shall be completed before purchases and/or sales receipts shall accompany such purchases. These designated employees shall complete an Annual Credit Card Authorization for the Visa card.
3. The Financial Administrator and the Office Manager may use the Visa card to procure hotel and airline reservations, meeting registrations for district personnel or board members, as well as approved financial purchases such as checks, tax forms, accounting software, etc.

Purchases of materials and services on the Visa card shall be made for one-time vendors or in situations where the District does not have an account set up. It is also used to make online internet purchases to obtain the best cost for an item.

The Office Depot, Home Depot, and Wal-Mart credit cards shall be used by employees upon authorization by the Director, Assistant Director or the Facilities Manager. A purchase requisition shall be made before purchases and a sales receipt shall accompany such purchases.

#### 2.1.13 Credit Card Statement Reconciliation & Management Review

For accountability, the Financial Administrator shall reconcile all credit card statements. The Director, or in their absence the Assistant Director, shall review for approval of all reconciled credit card statements. All credit card purchases including those made by the Director, or in their absence the Assistant Director, shall be reviewed for approval by the Board of Commissioners.

## 2.2 REMOVAL OF SIGNATORY AUTHORIZATION AND AUTHORIZATION TO OPEN A CREDIT CARD

1. The Director will notify the credit card company of the cancellation of credit cards and the removal of individual's authorization to use cards, except for Fueltrac cards. The Director will document in writing the name of the individual who has been removed from authorization, the

date, the credit card number, and the name of the card. If the credit card is in the individual's name, the card will be destroyed.

2. Authorization from the Director in writing will be required to open a new credit card.

## 2.3 COMPETITIVE BIDS AND PUBLIC LAW

### Public Bid Law

The District shall comply with all clauses of the Louisiana State Public Bid Law.

Regarding the purchase of materials and supplies, and as stated in the Louisiana State Public Bid Law or amended by the more stringent STPMAD policy, all purchases:

- **\$30,000 or greater for purchase of all materials and supplies**  
Advertised and let by contract to the lowest bidder according to specifications.
- **\$500 but less than \$30,000**  
Three written quotes.  
Obtain written confirmation of accepted offer.  
If lower quote than the accepted quote, reasons for rejection required (justification statement).
- **Purchases less than \$500**  
It is good public policy to obtain and document three (3) quotes, if possible.

## 2.4 PURCHASING OF NON-BUDGETED ITEMS

Purchases for items (machinery, equipment, supplies) or professional services that were not planned or budgeted require approval of the STPMAD Board of Commissioners if the cost of the items or services exceed \$30,000. All other purchasing procedures still apply to such items including Board approval of all contracts and the need for multiple vendor estimates.

## 2.5 EMERGENCY PURCHASES

Purchases or services that are needed immediately to prevent further damage to a STPMAD asset (e.g. building, aircraft, vehicle) or disruption of normal business operations must be approved by the Director or in their absence the Assistant Director. Provided the purchase or service is for <\$10,000, additional quotes or estimates are not required for emergency purchases.

## 2.6 FUEL PURCHASING CARDS

The District utilizes Fueltrac credit cards for the purchase of gasoline for District owned vehicles. A Fueltrac card is issued to each District owned vehicle and must remain in the vehicle always. All daytime employees who utilize a District vehicle are given an individual access code to make fuel purchases for a District vehicle. Only fuel can be charged on the Fueltrac card, except for oil in the rare instance of an emergency situation. Spray trucks used for night spraying are fueled during the day using a Fueltrac card by the employee(s) responsible for servicing spray trucks. Reconciliation of Bank Statements

### 2.6.1 Fuel Purchasing Reconciliation & Management Review

For accountability, the Accounting Manager shall reconcile all fuel purchasing statements. The Director, or in their absence the Assistant Director, shall review for approval of all reconciled fuel purchasing statements.

## 2.7 FUEL PURCHASES POLICY AND PROCEDURES

The District purchases fuel for its vehicles and equipment with Fueltrac system credit cards. Each vehicle is assigned a Fueltrac card, while each employee is given a five-digit driver number code. Upon filling the vehicle or equipment the driver must enter their driver number and the current odometer reading or hour number for equipment with hour meters. Odometer readings are used to calculate the miles driven since last fill-up and the fuel efficiency. Entering accurate odometer readings is critical. The District monitors fuel (gasoline and diesel) purchases to ensure that usage is reasonable, authorized, and that only District-owned vehicles and equipment are receiving the fuel. Personal use or theft of fuel will result in automatic termination and possible legal action.

Monthly vendor statements are carefully reviewed for completeness by the Accounting Manager (e.g. odometer readings and miles per gallon calculations). Unusual activity (e.g. purchases made out-of-town, more than one purchase on the same day, purchases made on the weekend, etc.) are to be immediately reported to the appropriate department supervisor and the Director or Assistant Director.

Fuel can either be purchased in bulk and inventoried/stored in tanks on-site for usage or be purchased from vendors that use a suitable fleet manager system (e.g. Fueltrac, etc.).

### 2.7.1 Credit Card Purchases - Fueltrac

1. The Facilities Manager is to maintain an accurate listing of all Fueltrac credit cards, including a photocopy of each card and the department and/or person that each card is assigned to.
2. The Facilities Manager is to annually conduct an inventory of all cards and any lost or stolen cards are to be terminated immediately.
3. Those employees assigned a Fueltrac card will keep the card securely in their District vehicle.
4. Employees are to enter accurate information (e.g. vehicle odometer reading) at the vendor's pump. Failure to enter accurate information may result in disciplinary action.
5. Upon termination of employment, the employee and pin number will be removed from the Fueltrac system.

## 2.8 CONTRACTS

The District may solicit and enter into contracts or agreements for service. Contracts or agreements for professional services are not subject to the Public Purchasing Law and therefore do not need to be publicly bid. However, it is a good practice to receive multiple bids and to write a justification for the vendor that was selected. All contracts must be approved by the Board of Commissioners, reviewed by the District's legal counsel, and signed by the Director. A log of active contracts will be kept on file.

# 3 TRAVEL

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## 3.1 TRAVEL EXPENSES WHILE ON DISTRICT BUSINESS

It is the policy of the District to provide travel advancement of funds and/or reimbursement to District personnel for reasonable and necessary expenditures made by District personnel while on official business. Mileage will be reimbursed at a rate per mile equal to the allowable IRS rate. If the choice is made to drive one's personal vehicle instead of traveling by air, the amount reimbursable for travel shall be the lesser amount; either the lowest available airfare rate or the vehicle mileage allowance. A per diem will be advanced to District personnel based on the destination of the travel. The per diem rate is based on the current established United States Government Services Administration (USGSA) daily rate for travel within the continental United States (CONUS). Travel outside the CONUS will be subject to the



U.S. Department of Defense (DOD) rates. The USGSA per diem provides a maximum lodging amount and a meals and incidental amount for major cities. It will be the policy of the District that the maximum lodging may be exceeded only in conditions where the conference to be attended is held at a hotel whose lodging rate exceeds the USGSA established rate.

## 3.2 TRAVEL PRACTICES

The Board of Commissioners shall approve in advance or retroactively any request for overnight travel for Board members and the Director. The Director and in their absence the Assistant Director shall approve in advance any request for travel for District personnel below the position of Director or Assistant Director.

All District personnel will be given a travel expense report form before departure and will be expected to submit the completed form shortly after returning from travel. District personnel, to the extent that is reasonable and practical, shall obtain lodging that is most economical. If the employee/Board member elects to be accompanied by his/her spouse and/or children, all those costs shall be paid by the employee/board member.

Parking fees shall be reimbursed for actual costs and receipts shall be presented whenever possible. Transportation such as taxi, bus service, or shuttle service are reimbursable for actual costs and receipts shall be presented whenever possible. The per diem includes payment for costs such as meals and tips.

If one returns from travel before 5:00 pm, only one-half day of per diem is allowed. If one departs for travel after 12:00pm, only one-half day of per diem is allowed.

### Non-reimbursed Expenses

Laundry (except whenever the period of travel exceeds seven days).

Tobacco

Alcoholic beverages

Entertainment

Telephone calls to home in excess of one per day. Care should be given to the length of such calls.

Meals and lodging, in lieu of other meals and/or lodging, which are included in a conference registration fee.

Fines, forfeitures, or penalties.

Expenses for a spouse, child(ren), and/or other non-district personnel.

Loss or damage to personal property.

Barber, beauty salon, shoe shine or toiletries.

Personal telephone calls in excess of one per day. Care should be given to the length of such calls.

## 4 CELL PHONE STIPEND

On-call supervisors may receive a cell phone stipend of \$55/month if deemed necessary by the Director/Assistant Director. Cell phone stipends shall be part of the employee's payroll and subject to federal and state withholdings; however, it shall not be considered as part of compensation with regard to other benefits such as retirement. Cell phone stipends shall be paid on the last pay period of the month. If an employee terminates prior to month end, the cellphone stipend shall be prorated based on days worked.

## Requirements

1. Employees receiving a cell phone stipend must have a cell phone capable of receiving and sending phone calls, text messages, and emails. The cell phone plan should be through a provider with comprehensive Parish-wide coverage, including coverage in other major metropolitan areas.
2. Employees may choose any plan or carrier they desire and are responsible for any and all contracts associated with the plan and the payment of any and all costs incurred for the service under the contract.
3. Employees are responsible for the purchase, maintenance and replacement of his/her cell phone equipment and accessories.
4. It is the employee's responsibility to ensure that the cell phone is compatible and meets all requirements. Failure to meet the criteria shall result in termination or reduction of the cell phone stipend.
5. The cell phone number, and any subsequent change of number, shall be provided to STPMAD. The phone number will be provided to STPMAD employees as needed.
6. All on-call employees receiving a cell phone stipend must be available via cell phone twenty-four hours a day, seven days a week. These employees shall make every attempt to carry their cell phone at all times in the event that they are needed after hours or in the event of an emergency.
7. Employees must set up and periodically check their work email on their cell phone.
8. Cell phone must be set to require a PIN code or password for access after a predefined inactive period (not to exceed 15 minutes).
9. Due to the inherent security vulnerability, the user should make all attempts to minimize storing sensitive or confidential Parish data on a cell phone.
10. Before disposing of a cell phone, the employee should take precautions by removing all access credentials to the STPMAD server, included erasing/deleting all sensitive/confidential STPMAD data.

## 5 HIRING

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The Director shall administer and coordinate the hiring process for all position vacancies below the level of Director. All hiring shall be conducted in the spirit of equal opportunity and the District will give consideration solely upon the applicant's qualifications and experience.

### 5.1 RECRUITMENT

- (1) A determination shall be made by the Director whether to accept in-house candidates in lieu of outside recruitment, after consultation with the appropriate supervisor(s).
- (2) As approved by the Director, an ad for local newspapers, trade publications, or professional journals shall be developed and placed for specific positions.
- (3) Candidates for employment are initially required to furnish the District with a completed standard application form or to give the District a detailed resume of his/her qualifications and experience.
- (4) The application shall be kept on file for at least six (6) months and be used to consider an applicant for all positions for which he/she might be qualified.
- (5) No application for a position shall be accepted after the published closing date. If there are not enough sufficiently qualified candidates at the closing date, the position may be reopened and re-advertised.

The Director, along with the appropriate supervisor(s), shall screen all applications received to determine qualifications for the position to be filled. After screening the application, the remaining applications will be reviewed again by the Director and the appropriate supervisor(s) before scheduling candidates for interviews.

## 5.2 TESTING

Examinations may be developed for certain positions based on the position's responsibilities.

The examination may consist of oral interviews/application review, a structured questionnaire, and practical tests or written tests. In all cases, the testing shall be job-related and designed to determine the candidate's knowledge, skill, and abilities for the position.

The testing process shall be administered by the Director and/or the appropriate supervisor.

## 5.3 INTERVIEW PROCESS FOR FULL TIME EMPLOYMENT

The employment interview is a supplement to and part of the selection process. The primary function of the interview is to obtain data on certain knowledge, skills, work experience, and abilities of a candidate not available through review of resumes or other testing mechanisms. Certain guidelines shall be observed to maximize the validity and reliability of the interview process.

The Director shall coordinate the interview process with one or more supervisors to constitute a panel that serves to schedule candidates, develop interview questions, etc. Questions developed for the interview process shall be job-related and designed to measure job knowledge, experience, and education or to solicit responses which reflect those personal traits which are job-related. Questions which pertain to race, gender, religious or marital status are prohibited.

Inquiries regarding certain specified sensory, mental or physical disabilities which relate reasonably to fitness to perform the particular job, or any disabilities or health problems which may affect work performance, that the employer should take into account in determining job placement are permitted. Each member of the interview panel shall score the candidates independently, attempt to reach a consensus, and make recommendations on final candidates, including their strengths and weaknesses.

## 5.4 REFERENCE CHECK

Before any offer of employment is extended, a reference check shall be conducted on the final candidate(s). The check includes verification of employment duties, dates of employment, work record, attendance record, strengths, weaknesses, safety record, and other pertinent information.

Results of the reference check shall be used to determine the fitness of the candidate for the position. A candidate may be disqualified for consideration for employment when any of the following facts exist.

- He/she does not possess the qualifications for the job.
- He/she has demonstrated an unsatisfactory employment record or personal record as evidenced by information contained on the application form or by the results of a reference check.
- He/she has made a false statement of a material fact or practical deception in their application.
- He/she is physically, mentally or otherwise unable to perform the duties of the position.
- He/she is not within the legal age prescribed by law.

## 5.5 MEDICAL EXAM/DRUG SCREEN/DRIVING RECORD REPORT

Before any offer of employment is extended, candidates for regular full time and all part-time employment positions shall be required to submit themselves to a medical exam and drug screen. Results of said tests must be favorable and satisfactory. The medical and drug screening tests will be provided at the employer's expense. In addition, employment is contingent on a favorable report from the Louisiana Department of Motor Vehicles.

## 5.6 CANDIDATE NOTIFICATION

After references are verified and a final decision reached, the candidate shall be notified of his/her selection, made an employment offer, and requested that the offer be accepted or rejected within a set number of days.

If the first offer is rejected, it shall be decided by the Director whether to hire another candidate or to reopen the position.

Once the candidate accepts the employment offer, the Director will notify other candidates by phone or in writing that they were not selected for the position.

For all regular full-time positions, an employment confirmation letter shall be forwarded to the final accepting candidate outlining the terms of the employment. All employment positions, including regular full time and part-time, are subject to favorable results of the requisite pre-employment drug screening test and/or medical examination, and driving record from the Louisiana Department of Motor Vehicles.

## 5.7 TEMPORARY HELP

The hiring process for temporary help shall not be as detailed as hiring full time employees. The following shall apply for the selection of individuals to fill temporary employment positions.

An ad shall be placed in local newspapers to announce position openings.

Candidates shall complete a standard employment application form or submit a detailed resume to the office.

Applications shall be kept on file for six (6) months and may be used to consider an applicant for all temporary positions for which he/she might be qualified.

The appropriate supervisor(s) and/or the Director shall screen all applications received to determine qualifications for the position to be filled. The remaining applicants will then be notified to arrange an interview.

The Director and/or one or two supervisors shall constitute a panel that serves to develop interview questions and schedule interviews, and coordinate and conduct the interview. Questions developed for the interview process shall be job-related and designed to measure job knowledge, experience, and education, or to solicit responses which reflect the personal traits that are job-related. Questions which pertain to race, gender, religious or marital status are prohibited. Inquiries regarding certain specified sensory, mental or physical disabilities which relate reasonably to fitness to perform the particular job, or any disabilities or health problems that may affect work performance, that the employer should take into account in determining job placement, are permitted.

Each member of the interview panel shall score the candidates independently, attempt to reach a consensus, and make recommendations on final candidates, including their strengths and weaknesses.

## 6 SIGNATORY AUTHORITY

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The Director has signatory authority for all District business on all accounts, requisitions, certifications, and any paperwork necessary on the District's behalf. In the Director's absence, the Assistant Director has the same signatory authority as the Director. For matters pertaining directly to the Director's employment or oversight the Board of Commissioners and particularly the Board Chairperson and the Secretary/Treasurer has signatory authority.

## 7 SPRAY EXCLUSIONS

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St. Tammany Parish property owners may request that their property be added to a spray exclusion database. Decisions regarding mosquito spray exclusion areas are made while balancing the desire of residents requesting spray exclusions with the obligation to provide mosquito abatement services to neighboring properties. STPMAD will review whether a spray exclusion area can be created to minimize potential impacts of the pesticide application on your property. The following criteria will be used to make the decision to grant a spray exclusion zone:

1. Aerial (airplane) mosquito pesticide exclusion:

Property location must be at least 1,500 linear feet from any adjacent property line. Given the speed and release height of the aircraft spraying adult mosquito pesticides distances to adjacent property lines of less than 1,500 feet cannot reasonably be accommodated.

2. Truck or ground mosquito pesticide exclusion:

Exclusion areas will be created for Parish roadways which are adjacent to the property owned by the individual making the request for the exclusion except when the roadway to be excluded is less than 300 linear feet from any adjacent inhabited building (residential or commercial).

If adjacent property owners consent to being included in the spray exclusion area, the additional distance gained on these properties will be considered. Adjacent property owners must make their own separate spray exclusion request.

In the event of a public health emergency, STPMAD reserves the right to spray properties regardless of placement on the spray exclusion list.

If at any point you wish to be taken off the spray exclusion list, please call STPMAD at (985) 643-5050. Since property ownership frequently changes, renewal of the signed form of consent is required every three years.

## 8 SPRAY REQUESTS

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St. Tammany Parish property owners may request that STPMAD perform mosquito adulticide applications on their property. Driveways will be added to the ground/truck adulticide "spray-on" map if the house or inhabited building is greater than 300 linear feet from the nearest parish maintained roadway.

## 9 PERSONNEL FILES

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Personnel files are kept on file for all past and present STPMAD employees by the Office Manager. Original copies of employment applications, tax documentation, benefit applications, job descriptions, signed acceptance statements, discipline records, performance evaluations, promotion/demotion notices, pay increase records and any other applicable forms are kept in individual personnel records. Supervisors may request to view and copy documents out of their employee's personnel records. Employees may request to view and copy documents out of their own file, but may not take the file out of the office and must not remove any item from their file.

## 10 TRAINING

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The District provides job specific training usually at the beginning of each year.

## 11 ANNUAL ADMINISTRATIVE SUGGESTED TIMELINE

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### 11.1 BUDGETING

Louisiana State laws dictates that public agencies produce an annual budget balancing revenue and expenses that separates the department, character, and function of all proposed expenses. The District operates its fiscal year from January 1<sup>st</sup> to December 31<sup>st</sup>. The operating budget is proposed at the October Board of Commissioners public meeting. A public hearing on the proposed budget is held prior to the November Board of Commissioners public meeting. The operating budget for the coming year should be approved by a resolution supported by a majority of the commissioners present at the November public meeting.

### 11.2 SALARY SCHEDULE/PAY INCREASE APPROVAL

STPMAD management proposes a salary schedule which sets the salary range for each job position. The Board of Commissioners must annually approve by resolution a salary schedule and the range of pay increases (cost of living and performance based). It is best for the Board of Commissioners to approve the pay increases and salary schedule during the November meeting so that pay increases may be implemented as soon as possible after January 1<sup>st</sup>.

All changes in salaries (positive or negative) must be approved by the Board of Commissioners.

### 11.3 CHEMICAL BIDS

A public bid process is conducted usually in October for all products used to abate mosquitoes. The Facilities Manager writes bid specs and contacts all known vendors which supply the products. The public bid process is conducted in accordance with state law. All bids are opened during the public meeting of the Board of Commissioners usually in November.

### 11.4 ANNUAL REPORTS AND COMING YEAR PLAN

Each department manager prepares an annual report to review their highlights from the past year for their department. Annual reports should be completed as soon after the end of the year as possible. Annual reports should include:

1. A summary highlighting the accomplishments of each department.
2. Appropriate tables and graphs that clearly describe the primary accomplishments. Departments that provide direct service to St. Tammany Parish residents should summarize variables such as but not limited to: total acres sprayed, gallons of product used, number of independent missions, miles of septic ditch sprayed, number of service requests, number of outreach events, an estimate of the number of people reached from the outreach program, and other appropriate totals for each department.
3. A statement which compares how the department achieved or failed to achieve the previous year's objectives.
4. A summary budget statement that discusses how each department ended the year with respect to their department's current year budget.

### 11.5 OPERATIONAL PLANNING

In addition to the annual report, each department should articulate a plan for the coming year. This plan should include primary objectives for the coming year and a statement describing the department's budget for the coming year.

### 11.6 PERMITS

District operations within the Big Branch National Wildlife Refuge are governed by a special use permit which is submitted for approval in December, by the Office Manager. Pesticide applications within the refuge must be coordinated with the Refuge Manager from the US Fish and Wildlife Service. Inspections on refuge property must also be coordinated with the refuge manager.

Occasionally, the district may also hold a bird sampling permit for arbovirus surveillance and research. These permits are also renewed annually.

### 11.7 PERFORMANCE EVALUATIONS

Employee performance evaluations are conducted every year usually in January. Performance evaluations are the basis for performance-based pay increases. A full description of the performance evaluation process is available in the Personnel Policy Handbook.

### 11.8 TRAINING

STPMAD management provides job specific training usually at the beginning of the year.

### 11.9 FINANCIAL PROJECTION

Each year, prior to the Board of Commissioners public meeting in which STPMAD management proposes the next year's millage rate (usually in May), STPMAD management will compile and distribute a five-year financial projection. The financial projection will demonstrate revenue, expenditure, and general fund growth at various millage rates.

### 11.10 ASSIGNED FUNDS PLAN

Funds may be assigned for certain long-term capital plans such as replacement aircraft or building expansion. The assigned funds plan should be reviewed and revised each year at the same time the financial projections and budgets are reviewed.

The commitment or assignment of funds and changes to previous commitments or assignments must be approved by vote of the St. Tammany Parish Mosquito Abatement Board of Commissioners and in accordance with applicable state laws. Funds are to be considered “assigned” only for planned purchases within a reasonable time frame (~3 years).

### 11.11 SURPLUS FUNDS

Given the unpredictable nature of mosquitoes and the pathogens they transmit, and the risk and liability associated with an aerial mosquito control operation, the Board of Commissioners recognizes the need to maintain funds in addition to (or in surplus of) those previously committed, assigned, or budgeted for any given year’s operating expenses. It is the policy of St. Tammany Parish Mosquito Abatement that the uncommitted, unrestricted, and unassigned fund balance should be at least 0.5 times the total current year annual operating expenses and should not exceed 3 year’s-worth of the total current year annual operating expense.

### 11.12 SETTING MILLAGE RATES

Millage rates must be formally adopted by the Board of Commissioners at the July Board meeting. It is useful to present the proposed millage rate to the Board of Commissioners as soon as the preliminary estimates are available from the St. Tammany Parish Tax Assessor, which is usually in May or early June.

### 11.13 PROPERTY TAX REASSESSMENT YEARS

### 11.14 INSURANCE REVIEW

## 12 FINANCIAL SERVICES

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A financial services institution (bank) is selected via a public bid process in accordance with the Public Banking law. The public bid process should be initiated every 3 years to select the bank that provides the best service at the highest interest rates to the District.

## 13 EMERGENCY SERVICES

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## 14 SALE OF DISTRICT VEHICLES OR EQUIPMENT

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## 15 HURRICANE PREPAREDNESS

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### Holiday Notices



US Fish and Wildlife Service Monthly Reports

Insurance

Aircraft

Copilot Contracts

Employment Separation

Worker's Compensation

## 16 POLLINATOR MITIGATION POLICY

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The mission of St. Tammany Parish Mosquito Abatement (STPMAD) is to protect the health and quality of life of residents of St. Tammany Parish by minimizing the risk of mosquito-transmitted diseases and managing nuisance mosquitoes to a tolerable level. We achieve this mission by sensitively monitoring mosquito abundance or indicators of mosquito-transmitted diseases and controlling larval and adult mosquitoes with environmental modification or the selective use of public health pesticides. The services provided by STPMAD are funded by a property tax millage that is voted on a ten-year cycle. As such STPMAD is obligated to provide mosquito abatement services to all residents of the parish. STPMAD recognizes the important economic and ecosystem benefits of pollinating insects. The district has adopted the following recommendations and policies to minimize the risk of mosquito abatement efforts on the health of pollinator populations:

### 16.1 LICENSE AND PESTICIDE LABEL PROTECTIONS

St. Tammany Parish Mosquito Abatement is licensed by the Louisiana Department of Agriculture and Forestry to apply mosquito pesticides. As such, applicators and inspectors receive regular training and continuing education to ensure the safe application of pesticides. STPMAD strictly adheres to all protections included on pesticide labels. Some protections included on pesticide labels are specifically listed to protect pollinator species such as bees.

### 16.2 RECOMMENDED PLACEMENT OF HIVES

To minimize the risk of bee exposure to insecticides intended for adult mosquitoes, STPMAD recommends placing hives at least 300 feet from the road. Additionally, we recommend orienting the hive entrance to point away from the road. If accommodating these recommendations is impractical, hives should be placed as far from the road as possible.

### 16.3 POLLINATOR DATABASE & SPRAY EXCLUSION REQUESTS

STPMAD maintains a database of bee hives and other pollinator gardens. This database is separate from the hive registry maintained by the Louisiana Department of Agriculture & Forestry (LDAF). To include your hive or pollinator garden on the STPMAD pollinator database fill out the web form at or call (985)643-5050.

Inclusion on this database does not guarantee that a location will be included on the spray exclusion list. Decisions regarding mosquito spray exclusion areas are made while balancing the desire of residents requesting spray exclusions with the obligation to provide mosquito abatement services to neighboring properties. When you request to put your hives on the database, STPMAD will review whether a spray

exclusion area can be created to minimize potential impacts of the pesticide application on your hive or pollinator garden. The following criteria will be used to make the decision to grant a spray exclusion zone:

1. Aerial (airplane) mosquito pesticide exclusion:

Hive or pollinator garden location must be at least 1,500 linear feet from any adjacent property line. Given the speed and release height of the aircraft spraying adult mosquito pesticides distances to adjacent property lines of less than 1,500 feet cannot reasonably be accommodated.

2. Truck or ground mosquito pesticide exclusion:

Exclusion areas will be created for Parish roadways which are adjacent to the property owned by the individual making the request for the exclusion except when the roadway to be excluded is less than 300 linear feet from any adjacent inhabited building (residential or commercial).

If adjacent property owners consent to being included in the spray exclusion area, the additional distance gained on these properties will be considered. Adjacent property owners must make their own separate spray exclusion request.

In the event of a public health emergency, STPMAD reserves the right to spray properties regardless of placement on the spray exclusion list.

If at any point you wish to be taken off the spray exclusion list, please call STPMAD at (985) 643-5050. Since property ownership frequently changes, renewal of the signed form of consent is required every three years.

## 16.4 REPORTING A SUSPECTED PESTICIDE RELATED BEE KILL

If you suspect that any application of a pesticide has killed bees, you must take quick action to collect evidence including photos and dead bees and have the samples tested by the Pesticide program of the Louisiana Department of Agriculture & Forestry. Collect both dead and live bees in Ziploc bags and store the specimens in a freezer. Contact the Louisiana Department of Agriculture & Forestry at (855) 452-5323 and STPMAD at (985) 643-5050. STPMAD is willing to assist with collection and processing of bees to be sent to a third-party for toxicological analyses. Toxicological analyses will help determine whether pesticides used by STPMAD were present, and in what concentration. STPMAD has created a quick reference to reporting a pesticide-related bee kill incident ().

## 17 INTELLECTUAL PROPERTY

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### 17.1 PURPOSE

The St. Tammany Parish Mosquito Abatement District ("District") adopts this Patent Policy for the purpose of encouraging and rewarding those employees who create works and inventions, to provide for full protection for those rights and inventions, and to provide for a fair distribution of revenues derived from those works and inventions.

## 17.2 DEFINITIONS

*Technology* can be defined as the application of science, especially to industrial or commercial objectives. Some resultant legal vehicles (intellectual properties) of the pursuit of these objectives are patents, copyrights and trademarks. The purpose of this policy is to create a means for the District as well as employees of the District to financially benefit from intellectual properties initiated by the District and to define the means to distribute profits from these properties.

Definitions.

The following words, terms and phrases, when used in this Policy, shall have the meaning ascribed to them in this section, except where the context clearly indicates a different meaning.

District shall mean the St. Tammany Parish Mosquito Abatement District, a political subdivision of the Parish of St. Tammany, State of Louisiana.

*District-supported invention* shall mean an invention created in whole or part with District funds, on District time, or with District materials.

*Creator* shall mean a District employee who creates a work or invention.

*Development expenses* shall mean all moneys paid for goods and services to protect, develop, and/or enhance the marketability or any other aspect of an invention, including, but not limited to, patent filing fees, cost incurred in securing or protecting patent rights, marketing expenses, patent maintenance fees, consulting fees, prosecution expenses, expenses incurred in dealing with equity interests, travel, attorney's fees and research costs. Not included as developmental expenses are salaries and general operating expenses of District administrative personnel.

*Employee* means all full-time and part-time employees of the District.

*Gross revenue* shall mean: (1) proceeds from the exploitation or manufacture, sale, lease, transfer, or other conveyance of an invention by an owner thereof, and (2) license fees, option fees, rwming royalties, and equity interests paid by a licensee for right to exploit an invention, except that equity interests, or any portion thereof, shall not be considered "gross revenue" unless and until the equity interests, or any portion thereof, are sold.

*Intellectual property* means any and all inventions, patents, copyrightable works and trademarks. Invention means any discovery, invention, process, method, composition of matter, machine, article of manufacture, know-how, design, model, technological development, biological material, strain, variety, culture of any organism, or any improvement of these items.

*Net income* shall mean gross revenues less all development expenses for a work or invention and its improvements and/or production.

*Work* means any work of authorship protectable under copyright law.

## 17.3 APPLICABILITY

This policy applies to all employees of the District. Employees receiving proceeds pursuant to this Policy shall continue to do so after termination of employment. Upon the employee's death, proceeds will revert to the employee's heirs or legatees. If this substitution results in additional

responsibility or expense to either the District or the employee's heirs or legatees, adjustments or financial distribution will be agreed upon by both parties by mutual consent. The District may require any persons or businesses doing business with the District to adhere to this policy.

Condition of Employment.

This policy, as amended from time to time, shall become a part of the conditions of employment of every employee, whether such employee was employed before or after its adoption.

Existing Intellectual Property.

This policy shall be applied to intellectual property created prior to the date of its adoption and to intellectual property created after the date of adoption.

Disclosure.

Every employee or person to whom this policy applies shall disclose to the District all District supported inventions created by the employee or person.

## 17.4 RELATIONSHIPS BETWEEN EMPLOYEES AND THE DISTRICT REGARDING BUSINESS TRANSACTIONS

Employees are required to receive written permission from the District before soliciting or participating in any business relating to any intellectual property subject to this policy. Each employee's prospective interest or relationship to the business involved will be subject to review and approval by the District.

## 17.5 PATENTS

Because significant District resources could lead to inventions, the District has an important interest in coordinating the activities of employees in this area. In recognition of this interest, and of the interests of the employees, the District will administer its rights to inventions in the manner described below.

## 17.6 DISTRICT'S RIGHTS TO PATENTS

Every invention or discovery or part thereof that is made by an employee within the scope of his or her employment shall be owned by the District. In return, the creator shall share in the proceeds therefrom as described or hereinafter set forth, subject to prior commitments to outside sponsoring agencies when applicable.

## 17.7 TRANSFER OF DISTRICT'S RIGHTS TO PATENTS

The District, after consultation with the creator, may in its discretion and upon such terms as it deems fit, cause any rights that the District may have in an invention to be transferred to the creator, in exchange for the District's income rights as hereinafter set forth. The District shall, in such case, execute all documents necessary to enable the creator to undertake protective measures and to make arrangements for the development and commercial exploitation of the invention.

## 17.8 ASSIGNMENT OF DISTRICT'S PATENT RIGHTS

The District may choose to assign its patent rights for development, commercialization or negotiation for sale of the patent.

## 17.9 COPYRIGHTS

Works that are protectable by copyright belong, under copyright law, to an employer if they are created by an employee within the scope of his or her employment or are otherwise deemed works made for hire under copyright law. Some specific types of work that may be protectable by copyright are books, poems, plays, songs, catalogs, photographs, computer programs, advertisements, labels, movies, maps, drawings, sculptures, prints and art reproductions, game boards and rules and recordings.

## 17.10 DISTRICT'S OWNERSHIP RIGHTS IN COPYRIGHTABLE WORKS.

Every work or part thereof that is created by an employee within the scope of his or her employment, or that is otherwise deemed a work made for hire under copyright law, or that is created by any person who agrees to the application of this policy is owned by the District.

## 17.11 TRANSFER OF DISTRICT'S RIGHTS TO COPYRIGHTABLE WORKS

The District may, after consultation with the creator, entirely in its discretion and upon such terms as it deems fit, cause its rights with respect to any copyrightable work to be transferred or licensed to anyone as permitted by law.

## 17.12 TRADEMARKS

Trademarks adopted and used by the District in connection with its activities, services and products shall be exclusive property of the District.

## 17.13 INTELLECTUAL PROPERTY TRANSFERRED BY THE DISTRICT

In every case in which the District transfers any rights to intellectual property to the creator, the creator may secure whatever legal protection may be available. The District shall execute all documents necessary to enable the creator to proceed. Where the District transfers its rights in accordance with this Policy, unless some other distribution is agreed to with the creator, the District shall be entitled to fifteen percent of net income in excess of \$10,000.00 derived from the exploitation of the transferred rights.

## 17.14 DISTRIBUTION OF NET INCOME FROM INTELLECTUAL PROPERTY

With regard to any intellectual property owned by the District, net income less any foreseeable development expenses the District deems necessary will be distributed as follows: 50% to the District and 50% to the individual creator (s).

## 17.15 TIMING OF DISTRIBUTIONS

Distributions of income will be made quarterly on or before May 1, July 1, October 1, and January 1 of each year, to allow the District to account for all applicable licensing and related expenses. In

instances where funds are held because of foreseeable development expenses or where expenses exceed revenue, the creator(s) will be sent an accounting indicating the amounts received for the current three-month period and the amount of the anticipated expense or deficit. Once expenses are known with certainty, any excess withholding will be distributed. Income earned before the enactment of this policy will be paid on a quarterly basis at a rate of not less than 20% of the total amount due.

## 17.16 METHOD OF PAYMENTS

Payments of the amounts allocated to the creator(s) must be made to the creator(s) individually and cannot be assigned by the creator(s) to other parties or entities. The only exception will be that after the creator's death, upon appropriate notification by the personal representative of the creator's estate, and with court approval, if necessary, payment will be made to the creator's heirs or legatees. An IRS form 1099 or other appropriate form will be issued to the creator(s) for their share of revenues. The District will not advise individuals on the tax consequences of these payments. In the event there are multiple creators for an invention or work, the creators' share will be divided equally among all creators. If the creators agree among themselves to a different division, the District must be notified in writing at least one month prior to the date of the first income distributions as to the agree-upon division of income.

## 17.17 ROYALTY SHARING

Royalties generated by any works, trademarks, licensing, manufacturing, distribution, direct or indirect sales, and/or equity agreements between manufacturers and the District will be shared between and among the parties involved. The District and creator (s) involved, and any other involved parties will collaborate to confect an agreement detailing the sharing of royalties.

# 18 PUBLIC MEETINGS

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The STPMAD Board of Commissioners define *public comments* as items of fact or opinion presented by guests to the meeting that were not scheduled to present on specific Board agenda items or are formal advisers to the Board.

## 18.1 RESTRICTIONS TO THE PUBLIC COMMENT PERIOD

- 1) Individuals wishing to publicly address the STPMAD Board of Commissioners must state their name, address, and group affiliation (if appropriate).
- 2) A period will be designated at the beginning of each meeting of the STPMAD Board of Commissioners for public comments.
- 3) Public comments may be solicited prior to the Board's discussion on specific agenda items at the discretion of the Board Chairperson.
- 4) Public comments will be limited to three minutes per person.
- 5) All comments shall be made with civility and courtesy. The Board Chairperson may prohibit further comment if proper decorum is not displayed.
- 6) The public comment period is not a question and answer period and the Board is not obligated to respond to comments.

## 19 INVENTORY CONTROLS

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### 19.1 OFF-SITE INVENTORY

To ensure inventory control while maintaining the need for unaged pesticides that are stored off-site, pesticide inventory should be monitored at least biannually. At the request of STPMAD, storage facilities shall produce a letter attesting to the quantity of the stock owned by STPMAD under their storage. This count will then be compared to the internally-maintained STPMAD counts of the product. Off-site inventory shall be insured for loss or damage, at the cost of the storage facility or distributor.